

## Visitor Survey Findings and Responses

**N =**

### **1. Did you receive the F.A.T., Virginia information sent to you earlier?**

<b>Yes</b>	<b>66.38%</b>
No	17.67%
Don't Remember	15.95%
No response	0.85%

Nearly three-fourths (%) of respondents report they remember receiving the information. Slightly more than one-tenth (%) report they do not recall receiving the information. And approximately one-fifth (%) do not recall whether they received the information or not. (N=, % No response).

*Thus, the F.A.T. can have confidence that respondents are answering the questions in this report based on remembering that they received the information.*

### **2. Was there information you expected to receive, but didn't?**

Yes	9.93%
<b>No</b>	<b>90.07%</b>
No response	35.47%

The information requested by potential visitors to an area often does not meet or only partially meets their information needs. A substantial % responded No to this question, indicating that they had received the kind of information they expected. Slightly less than % reported their expectations were not met by the kind of information they received. A little less than one-third (%) of the respondents did not answer the question. (N=, % No response).

In this report, we see that the information sent to those who requested it did meet their expectations. This is a positive sign that the F.A.T. is meeting the information needs of potential visitors. However, one must also realize that although the majority of the respondents report that the information they received matched their expectations, as an industry we have trained the public to expect certain types of information. This does not necessarily mean that the information is as good as it can be. *It means that the information is similar to information they normally see about a destination.*

## **Visitor Survey Findings and Responses**

### **3. *Did you ever travel to or through the F.A.T., Virginia area before you received the information?***

Yes	44.08%
<b>No</b>	<b>55.92%</b>
No response	35.04%

This question was asked to determine if potential visitors made a trip to Fredericksburg Area prior to requesting information. Slightly less than two-thirds (%) stated they had not traveled to or through Fredericksburg Area before receiving the information. A little more than one-third of the respondents (%) stated they had traveled to Fredericksburg Area prior to receiving information. Approximately one-third of the total respondents (%) did not respond to the question. (N=, % No response)

The responses to this question indicate that a significant majority of respondents have never visited F.A.T., and therefore the information is targeting many new potential visitors to the area. However, a significant level of familiarity with the destination was reported by more than one-third of the respondents (%) of the responses. This indicates that many travelers are requesting information from the F.A.T. to plan repeat visits to the county.

*Thus, Fredericksburg Area might capitalize upon its existing level of familiarity and also add significant numbers of new visitors through its tourism marketing efforts.*

### **4. *Did you travel to or through the F.A.T., Virginia area after you received the information?***

Yes	28.76%
<b>No</b>	<b>71.24%</b>
No response	34.62%

This question was asked as a qualifying question to sort the potential visitors into those who made and those who did not make a trip to the area. Those who made a trip continued with more detailed questions about their trip; those who did not make a trip answered general demographic questions only. Slightly less than two-fifths (%) did travel to the Fredericksburg area after they received the information, while slightly more than three-fifths (%) did not choose to make the trip. Slightly less than one-third (%) did not answer the question.

*Thus the expected conversion rate for the F.A.T. can be predicted to be just under the % (%) level.*

## Visitor Survey Findings and Responses

### **5. How many times have you visited the F.A.T., Virginia area since you received the information?**

Average Number of times = 1.43

73.81% of respondents that answered question #5 reported 1 time

### ***Circle the months during which you visited.***

Jan	1.71%
Feb	0.85%
Mar	0.85%
Apr	2.14%
May	2.99%
<b>Jun</b>	<b>3.42%</b>
<b>Jul</b>	<b>5.13%</b>
<b>Aug</b>	<b>5.56%</b>
<b>Sep</b>	<b>3.42%</b>
Oct	0.43%
Nov	0.85%
Dec	0.43%
No response	81.62%

This question was asked to discern how many trips resulted from the visitor information distributed by the F.A.T. and to document the months of visitation by inquirers. The respondents report that the months with highest visitation to Fredericksburg Area were . The winter months of had the lowest visitation.

This information somewhat matches information provided by the State of Virginia for general visitation to the northern Virginia area. Traditionally summer and fall have been the highest visitation seasons, with winter the lowest. The low visitation in the Autumn months indicates a great opportunity for future promotion of leaf season visitation. National trends tell us that off-season visitation to rural regions is growing as the typical consumer is taking more frequent, short-term vacations to escape urban areas. Also, there appears to be mixed results here indicating that perhaps various local events or functions may account for some of the visitation patterns.

*Thus, the F.A.T. needs to examine local event and visitation patterns and develop strategies for increasing visitation where possible.*

## **Visitor Survey Findings and Responses**

### **6. Regarding the Fredericksburg Area information you received, what do you remember liking or disliking the most? (write in your answers)**

#### **Information Likes Of Survey Respondents**

- A Lot Was Offered, And Places To Go.
- Accommodations Info - 4
- A M S E
- Amse

#### **Information Dislikes Of Survey Respondents**

- A Decent **Map**
- Couldn't Find Plomley Rd
- Did Not Include Info About Alexander Inn, I Had To Call For
- This Phone #. Info Packet In 2000 Still Has Nothing Mentioning The Alexander, This Was

This question was asked to determine which information is most important to potential visitors, and how well the F.A.T. is meeting these needs.

The same items are often listed as likes and dislikes. Every respondent has a different level of expectation and therefore the same map can be satisfactory to one person and inadequate to others.

*Thus, the F.A.T. can be assured that it is providing an appreciated information service. Also, F.A.T. now has evidence of what potential visitors would most like to see in revised, updated visitor information.*

## Visitor Survey Findings and Responses

### **7. Where did you find out about the information packet? The TOP SIX are in bold.**

<b>Guides – AAA Tourbook</b>	<b>6.41%</b>
<b>Internet – Virginia Tourism web site</b>	<b>4.27%</b>
<b>Brochures – Fredericksburg Area Tourism</b>	<b>4.27%</b>
<b>Guides – Virginia State Travel Guide</b>	<b>3.42%</b>
<b>Guides – Guide to Virginia's Civil War</b>	<b>3.42%</b>
<b>Internet – Fredericksburg web site</b>	<b>3.42%</b>
Magazines – Reader's Digest	2.99%
Magazines – Family Circle	2.14%
Newspapers – USA Weekend Sun. Mag. (found in your newspaper)	2.14%
Brochures – Spotsylvania County Brochure	2.14%
Welcome Center – Virginia Welcome Center (I-95)	2.14%
Welcome Center – Fredericksburg Visitor Center	2.14%
Other (specify)	1.71%
Magazines – Ladies Home Journal	1.28%
Newspapers – Newspaper travel features	0.85%
Welcome Center – Spotsylvania County Visitors Center	0.85%
Magazines – Better Homes & Gardens	0.43%
Newspapers – Adv. Inserts in newspapers	0.43%
Magazines – New Choices	0.00%
Welcome Center – Virginia Welcome Center (I-64)	0.00%
Welcome Center – Virginia Welcome Center (I-85)	0.00%

Listed as "Other":

- **Fredericksburg Area Chamber Of Commerce - 4**
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It is useful to know where potential visitors find out about travel information packets. This information will help with the planning of future marketing strategies.

According to Travel Industry of American (TIA) national surveys have identified the following as the most preferred sources of information about travel destinations:

- Recommendations by friends and family
- State travel guides
- Brochures
- Magazines
- Newspapers
- TV
- Internet

## **Visitor Survey Findings and Responses**

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### **7. (Cont'd)**

The most frequently mentioned source (%) in the Fredericksburg Area study is the AAA Tour Book. This is unusual when compared to other regional research studies and reflects the large number of World War II Generation travelers who are visiting the area because of the Manhattan Project. In all similar research studies conducted by RTM the state travel guide has most always been the top source that visitors list for source of information about a particular destination. In this study the Virginia State Travel Guide came in fourth. However, we have seen the Internet's response rate increasing over the past few years and in the last year the Internet has been the number one source of information in most of the studies RTM has completed. In this research study the Fredericksburg Area web site is the second most mentioned source of information.

The F.A.T. Visitor Guide had a response of % and ranked third as an information source. In comparison with other similar destinations we have studied and comparing to national data this percentage is good, but could be improved upon.

*Thus, the AAA Tour Book, the Fredericksburg Area web site, the Virginia State Travel Guide and the Fredericksburg Area brochure are prime sources for visitor interested in F.A.T. Additionally, we see that the F.A.T. must place high emphasis on developing an improved outreach strategy to generate increased inquiries from its primary brochures and Internet presence.*

### **8. How many nights did you spend in F.A.T.?**

Typical responses = 0 to 3, Average number of nights = 2.73

The average length of time visitors stay in an area is a useful piece of information when planning marketing strategies. The majority of the responses to this question represented one to three night stays with the average of nights reported.

The responses here are comparable to what RTM typically finds in small towns and rural areas. This tells us that visitors either plan weekend getaways or short stays based on getaways, visiting friends and relatives, or local activities.

*Thus, we see here that the F.A.T. can have confidence in its product as having appeal for a two to three night stay. Future product development and effective promotion of additional activities in the area will drive longer lengths of stays.*

## **Visitor Survey Findings and Responses**

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**9. What was the main purpose of your last visit to F.A.T.? (Circle main purpose or reason for your visit) The TOP SIX responses are in bold.**

<b>Civil War History</b>	<b>35.29%</b>
<b>Visit friends / relatives</b>	<b>17.65%</b>
<b>Vacation / getaway</b>	<b>17.65%</b>
<b>Overnight as part of a longer trip</b>	<b>14.71%</b>
<b>Attend a festival / event</b>	<b>5.88%</b>
<b>Outdoor recreation day trip</b>	<b>5.88%</b>
Rev. War / Colonial History	2.94%
Meeting / convention	0.00%
Business	0.00%
Golf	0.00%
Relocation	0.00%
Sports event	0.00%
Fishing / boating	0.00%
Hiking / biking	0.00%
Antique shopping	0.00%
Other (specify)	0.00%

The primary purpose of a trip is often a key around which promotional messages can be developed.

Here we see the largest percentage (%) reported Vacation/Getaway as the primary trip purpose. This is very encouraging as it clearly identifies interest in Fredericksburg Area as a vacation destination. Additionally, the large percentage of visitors coming for history (%), to see friends and relatives (1%) and overnighiting as part of a longer trip (%) is impressive for a small town like F.A.T. Obviously, the interstate highway drives occupancy as part of a longer trip, but this is also a market worth targeting. Immediate tax revenue increases can be obtained from this overnight market and long term gains can be achieved by marketing the county for a return visit to these overnigheters.

*This tells us that Fredericksburg Area can have confidence that it is perceived to be a potential getaway and vacation destination, as well as a good overnight stopping point. Thus, people are predisposed to visit.*

## Visitor Survey Findings and Responses

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**10. What type of lodging did you use most during your last visit? (circle one)  
The TOP THREE are in bold.**

<b>Hotel</b>	<b>32.50%</b>
<b>Motel</b>	<b>32.50%</b>
Campground	5.00%
Rental cabin / cottage	0.00%
Bed & breakfast	7.50%
Friends / family house	15.00%
Inns (20 rooms or more)	0.00%
Other (specify)	7.50%

Awareness of the types of lodging used by visitors will help the F.A.T. track and document the impact of its marketing efforts for its lodging constituents.

In this study, the largest percentage of respondents reported they stayed in a hotel or motel (%). Friends or family houses were the next largest category of overnight choices (%).

This information matches what RTM typically finds. Generally we find that the majority of tourists prefer a hotel or motel.

A 1998 study by *D. K. Shifflet & Associates* for the *American Hotel and Motel Association* found that 67% of all visitor expenditures are driven by leisure travelers and 33% by business travelers.

*The findings in this study reveal that leisure travelers prefer hotels and motels when not staying with friends and relatives. Thus, leisure travelers as well as business travelers are prime target markets for hotels and motels in Fredericksburg Area and Anderson County.*



## **Visitor Survey Findings and Responses**

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### **11. Including you, how many people went on the trip?**

Adults:	Typical response = 2 Average number of adults = 2.35 Percentage of visitors traveling with adults only = 67.44%
Children:	Typical response = 1 or 2 Average number of children = 1.93 Percentage of visitors traveling with children = 32.56%

An important part of a visitor profile is the size of the group visiting an attraction or a destination.

The typical response in this study was a travel party size of 2 adults. Families traveling with children typically listed 1-4 children in their travel party.

Overall, % of respondents reported their travel party was comprised of only adults. Less than two-fifths, or % of travel parties contained children. Nationally, Travel Industry of America (TIA) reports that family vacation travel accounted for 72% of all vacation trips in 1998. While this number differs with the Fredericksburg Area research an explanation can be found in the lack of children oriented products offered in the Fredericksburg Area area.

*Currently Fredericksburg Area is more successful in attracting adult travel parties without children. Thus, we can conclude that Fredericksburg Area should place the greatest emphasis on marketing itself to adult travel parties and begin to strategically build awareness of the activities that are available for families with children.*

## Visitor Survey Findings and Responses

### **12. Please estimate how much you spent during your last trip to F.A.T.:**

<b>Area</b>	<b>Highest amount</b>	<b>Lowest amount</b>	<b>Average amount</b>
Lodging	\$1500.00	\$0.00	\$230.64
Trans., fuel, airfare, etc.	\$1000.00	\$20.00	\$156.05
Shopping	\$500.00	\$20.00	\$110.69
Food/meals	\$1500.00	\$10.00	\$240.61
Attractions/amusements	\$1500.00	\$10.00	\$141.32
<b>TOTAL</b>	<b>\$3700.00</b>	<b>\$40.00</b>	<b>\$716.90</b>

Knowledge of the spending habits of those who travel to Fredericksburg Area will benefit the F.A.T. in projecting realistic revenue growth in the future. The above figures, when combined with the average length of stay information (question #8), provide insight into the economic impact that each travel party generates in a community.

As found in question #8, the average length of stay in Fredericksburg Area is nights. Therefore, dividing the average amount spent while in the area by the average number of nights determines the average daily expenses in each category. Using this formula, the typical travel party spent the following amounts each day:

<b><u>Category</u></b>	<b><u>Amount</u></b>	<b><u>% of whole</u></b>
1. Lodging	\$	%
2. Transportation/Fuel	\$	%
3. Shopping	\$	%
4. Food/Meals	\$	%
5. Attractions/Amusements	\$	%
<b>Average Daily Expense</b>	<b>\$</b>	<b>100.00%</b>

These figures are similar to those found in research studies throughout the rural south and reflect travel habits identified in research conducted by TIA. The largest daily expense (%) for travelers to Fredericksburg Area is lodging. The second highest expense (%) is transportation/fuel. Third is shopping (%), food and meals is rated fourth (1%). Lastly in fifth place is attractions/amusements (1%).

## **Visitor Survey Findings and Responses**

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### **12. (Cont'd)**

The only unusual thing we see here is the shopping category. Normally, we find shopping to be a larger expenditure than food/meals, and often we find it to be the number one expenditure. Shopping is identified nationally as the number one tourist activity. One will also see in the next question below that shopping is the number three tourist activity for visitors to Fredericksburg Area after driving/sight seeing and visit a museum. When we do find shopping to be the largest expenditure, we can be sure that the destination is taking maximum advantage of economic impact opportunities. The findings here indicate that the Fredericksburg Area Tourism might do more to promote shopping venues to visitors and to encourage development of more unique shopping opportunities for tourists.

*Therefore, Fredericksburg Area can have confidence in the level of average daily spending reported by visitors. Future marketing efforts should include an emphasis on the shopping highlights of the area as a reason to visit and extend the stay. Additionally, the F.A.T. should encourage local businesses to develop more shopping opportunities for visitors to most effectively grow per visitor expenditures.*

## Visitor Survey Findings and Responses

- 13. The following is a list of activities that people may do while visiting F.A.T. Please circle all activities that at least one member of your travel party did while visiting. (The TOP TEN activities are in bold.)**

<b>Visit a historic site</b>	<b>15.81%</b>
<b>Visit historic downtowns</b>	<b>14.96%</b>
<b>Driving / sightseeing</b>	<b>14.96%</b>
<b>Visit a battlefield</b>	<b>14.10%</b>
<b>Shopping</b>	<b>13.68%</b>
<b>Visit a museum</b>	<b>12.82%</b>
<b>Antique shopping</b>	<b>8.97%</b>
<b>Visit a state park</b>	<b>5.98%</b>
<b>Visit an art gallery</b>	<b>4.70%</b>
<b>Carriage / trolley ride</b>	<b>3.42%</b>
Visit a winery	2.14%
Golf	1.71%
River / nature tours	1.71%
Attend a festival / event	1.71%
Attend cultural events	1.71%
Camping	1.28%
Biking	1.28%
Boating / fishing	0.85%
Meeting / seminar	0.85%
Business	0.00%

Activities listed as “other” included:

- Dining
- Church – 2
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In assessing the overall perceptions of product value, it is important to note the activities in which visitors participate. This also provides clues as to which marketing messages might be most successful. In other research studies conducted by RTM in the Southeast we find similar responses to the data presented here. Frequently mentioned activities in other similar studies include shopping, sightseeing and spending time in the downtown area.

## **Visitor Survey Findings and Responses**

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### **13. (Cont'd)**

According to RTM research and as documented by Travel Industry of America (TIA), activities participated in by U.S. resident travelers for 1998 included:

- Shopping (33%)
- Outdoor (camping, hiking, biking, etc.) (17%)
- Historical Sites/Museums (15%)
- Beaches (11%)
- Cultural Events/Festivals (10%)
- National/State Parks (9%)
- Theme/Amusement Parks (8%)
- Nightlife/Dancing (8%)
- Gambling (7%)
- Sports Event (6%)
- Golf/Tennis/Skiing (4%)

Additionally, TIA reports that visitors planned the following activities after arriving at their destination:

- Restaurant (48%)
- Shopping Area (45%)
- Museum or Exhibit (26%)
- Sightseeing Tour (24%)
- Movie (16%)
- Theme Park (15%)
- Religious Service (14%)
- Live Theatre or Other Performance (14%)
- Festival or Parade (13%)
- Other Activities/Attractions (24%)

The information learned in the Fredericksburg Area study compares favorably with the data learned nationally and at the state level. *Thus, the F.A.T. can have confidence that promotion of its museum, sightseeing, walking/driving tours, historic sites, downtown and outdoor activities will appeal to potential tourists.*

## **Visitor Survey Findings and Responses**

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**14. Overall, on a 5 point scale (where 5 is Excellent, 3 is Average, and 1 is Poor), how would you rate your last visit to F.A.T.?**

5 (Excellent)	47.73%
4	43.18%
3 (Average)	9.09%
2	0.00%
1 (Poor)	0.00%
No response	81.20%
<b>Average Rating = 4.39</b>	

The rating of a visit to an attraction or a destination by visitors is useful in understanding if visitor expectations are being met by actual experiences. Further, it provides a clue to likelihood of return/repeat visits in the future. It is also a good measure of how well visitors will speak of Fredericksburg Area to their friends and relatives.

It is important for Fredericksburg Area to realize that typically a visitor rates their vacation experiences highly. Vacations, perhaps even in foul weather or less-than-desirable conditions are still appreciated by visitors compared to their normal hectic lives. Therefore, one must look very critically at the ratings provided here.

RTM prefers to see a solid "A " (or upwards of a 4.5) rating for destinations. Ratings over this mark confirm for us that the destination or attraction is providing excellent value and is well positioned with expectations matching actual experiences. When we find ratings below the "A" or 4.29 mark, we see this as an indication that the value of the destination/attraction needs to be examined.

*Thus, we can deduce that Fredericksburg Area is not as well perceived as it could be and earns average to good ratings by its visitors. Fredericksburg Area has an opportunity to increase the overall satisfaction of tourists.*

## Visitor Survey Findings and Responses

### **15. What do you remember liking or disliking the most about your last trip to F.A.T.? (write in your answers)**

#### **Top Reported Likes**

- Accessibility From Major Travel Route/Hwy.
- American **Museum** Of Science & Energy
- Amse
- Arts Scene

#### **Top Reported Dislikes**

- Better street maps
- Bugs
- Detour traffic jam
- Didn't know you had to be there by a certain time in the morning to take part of the tour.

### **15. (Cont'd)**

Knowledge of the characteristics or attributes which visitors liked and disliked about their visit is useful information in assessing product quality, to provide to local tourism entities for corrective measures, and for developing new promotional messages.

*Clearly, the friendly people, the scenery, and the museums offer appeal to visitors. The dislikes primarily included wayfinding, traffic and the desire for better interpretation of the historic sites.*

## Visitor Survey Findings and Responses

**16. Following is a list of attractions and events offered in F.A.T. First, check (0) those that you visited & rate from 5 to 1, (5 is Excellent, 3 is Average, and 1 is Poor). Second, check those you heard of & didn't visit, and then check those you have never heard of.**

Attractions	Visited	Heard of	Never heard	Rating
Belmont	2.14%	8.55%	2.56%	4.80
Chatham	4.27%	7.69%	2.56%	5.00
<b>Fredericksburg Area Museum &amp; Cultural Center</b>	<b>12.39%</b>	<b>4.70%</b>	<b>0.00%</b>	<b>4.52</b>
<b>Civil War Battlefields</b>	<b>14.96%</b>	<b>2.56%</b>	<b>0.00%</b>	<b>4.52</b>
George Washington's Ferry Farm	2.56%	11.11%	1.28%	4.60
Lake Anna State Park	2.99%	7.69%	3.85%	4.29
Hugh Mercer Apothecary Shop	3.85%	5.98%	0.43%	4.89
James Monroe Museum	4.70%	8.97%	1.28%	4.45
Historic Kenmore	4.27%	8.55%	1.28%	4.80
Mary Washington College and Galleries	2.14%	10.68%	1.28%	4.00
Mary Washington House	3.85%	8.55%	2.14%	4.78
George Washington Masonic Lodge Museum	0.85%	9.83%	2.99%	5.00
National Bank Museum	0.43%	7.26%	5.56%	5.00
Rising Sun Tavern	5.13%	5.98%	3.42%	4.67
Riverside Dinner Theater	1.71%	4.27%	6.84%	5.00
<b>Spotsylvania Courthouse &amp; Historic District</b>	<b>8.12%</b>	<b>5.98%</b>	<b>0.85%</b>	<b>4.67</b>
Spotted Tavern Winery & Cider Mill	1.71%	5.98%	5.13%	4.50
<b>Historic Downtown Fredericksburg (shops, etc.)</b>	<b>15.81%</b>	<b>1.28%</b>	<b>0.00%</b>	<b>4.60</b>
White Oak Museum	1.28%	5.13%	6.84%	5.00
All American Carriages	0.85%	4.27%	8.12%	4.50
Living History Experience	1.28%	6.41%	5.56%	5.00
Trolley Tours of Fredericksburg	2.99%	9.83%	1.71%	5.00
<b>Central Park (shopping, dining, entertainment)</b>	<b>8.12%</b>	<b>5.98%</b>	<b>2.56%</b>	<b>4.47</b>
Belvedere Plantation	1.71%	7.69%	3.85%	5.00
Central Park Funland	0.85%	4.70%	7.69%	4.00
Fredericksburg Ice Park	0.43%	4.70%	8.55%	4.00
Putt Putt Golf & Games	1.28%	3.85%	8.12%	4.33
Civil War Walking Tour	5.56%	8.55%	1.71%	4.33
Rappahannock Ecotourism Tours	0.00%	4.27%	8.55%	NR
Old Town Falmouth	1.71%	7.26%	5.13%	4.75
Lake Anna Winery	1.28%	5.13%	6.84%	5.00
River Cruise "City of Fredericksburg"	2.14%	5.98%	4.70%	4.80
Hartwood Winery	1.28%	5.13%	6.84%	4.67
Winery Tours	1.28%	7.69%	4.27%	5.00
Walking History / Architecture Tour (Self-Guide)	5.13%	5.98%	3.42%	4.58



## **Visitor Survey Findings and Responses**

### **16. (cont'd)**

Awareness level, compared to the percentage of attendance and the rating of each attraction and event tells us a great deal about how visitors appreciate these individual attractions and events. It also provides critical clues for the most effective positioning for the F.A.T.

In analyzing this data one wants to see a relatively high awareness level (above 3%). Visitation percentages tell us how much appeal the attraction currently enjoys among visitors. Here we want to see a percentage in high proportion to the awareness level. Otherwise one might conclude that although the visitor is aware of the product, they are not compelled to visit, or perhaps the event/attraction is not available when they visit. Finally, one wants to note the rating of the attraction/event. This provides clues as to the perceived quality of the experience and whether an individual attraction/event may or may not be of critical importance for the majority of visitors. RTM looks for an overall rating of over 4.5 or "A" grade in determining high product quality.

The Fredericksburg Area attractions/events with the top awareness level include (in rank order):

- *ORNL/Y-12*

The most frequently visited/participated in attractions/events include (in rank order):

- *America*

The attractions/events with an acceptable level of awareness, relatively high visitation and the top rating over or near a 4.5 (excellent) include (in rank order):

- *American*

One trend that caught our attention is the large number of sites and attractions that have high awareness levels but a low attendance levels and relatively low satisfaction ratings. This might mean that many of these activities are unavailable during primary visitation times. Since such a small percentage of visitors actually visited these attractions/activities, the ratings might be a little suspect.

## **Visitor Survey Findings and Responses**

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### **16. (Cont'd)**

RTM has noted in bold the attractions and events that, in our analysis, have the most compelling appeal for visitors. We come to this conclusion by identifying a good percentage of awareness (approximately 3% or higher), a healthy percentage of actual visitation, and a high rating of quality of experience.

Please note that we do not typically rate annual events as offering top appeal because they offer only a limited time economic impact. For instance Augusta, GA may be well known for the Masters golf event, but it can't be counted upon for overall year round economic impact.

*Thus, in analysis the following attractions offer the primary appeal for a visit to the Fredericksburg Area area:*

- American

### **17. What type of attractions or activities would you participate in if offered in F.A.T.? (circle the number of ALL that interest you). The TOP FIVE responses are in bold.**

	<b>Civil War Reenactments</b>	<b>70.94%</b>
	<b>Arts &amp; crafts festival</b>	<b>64.53%</b>
	<b>George Washington Museum</b>	<b>63.68%</b>
<b>Multi-entertainment complex with hotels/shops/attractions</b>		<b>56.84%</b>
	<b>Antique trail</b>	<b>54.27%</b>
<b>1-man shows: Robert E. Lee, Ulysses S. Grant, Geo. Wash.</b>		<b>48.72%</b>
	River ecology excursions	36.32%
	Jazz Club	17.09%
	African American history trail	17.09%
	Golf trail	12.39%
	Other (specify)	8.97%

Knowing the unmet needs or types of attractions/events/activities, which will draw visitors to an area is powerful information for Fredericksburg Area to use in economic development and tourism product enhancement efforts. The top five attractions and activities that tourists would like to see added in Fredericksburg Area are identified above.

RTM finds it interesting that the “new, desired products” in this case reflect the most appreciated existing products including historic guided tour, train museum, and interactive science museum.

### **Visitor Survey Findings and Responses**

Also, one should note the very high percentages of appeal for the top five items identified in this question. Anything rated over a 40% mark is considered extremely attractive to visitors.

*Thus, strategic development and placement of these activities in Fredericksburg Area will most likely result in increased visitor appeal.*

## **Visitor Survey Findings and Responses**

### **18. Are you planning to visit Fredericksburg Area in the next year?**

<b>Yes</b>	<b>70.75%</b>
No	29.25%
No response	9.40%

**If Yes, what month(s) do you plan to visit? (circle the number of each month you plan to visit)**

Jan	1.71%
Feb	3.85%
Mar	2.56%
<b>Apr</b>	<b>10.68%</b>
<b>May</b>	<b>14.10%</b>
<b>Jun</b>	<b>15.81%</b>
<b>Jul</b>	<b>16.24%</b>
Aug	10.26%
Sept	6.84%
<b>Oct</b>	<b>11.97%</b>
Nov	6.84%
Dec	4.70%
No response	38.46%

Approximately three fifths (%) of visitors report they plan to visit Fredericksburg Area and Anderson County within the next year. % indicate they will not. RTM looks to this data to indicate overall satisfaction with the visit and for a commentary as to whether the product offering is broad enough to warrant repeat visitation. A % positive response is good. However, RTM prefers to see an affirmative response to this question in the range of 75% or higher. Again, this indicates to us the ideal satisfaction level with the product.

The months reported as most likely for repeat visits include summer and autumn followed by early spring and winter being less likely. This is similar to patterns we normally find. This also represents an opportunity to inform current visitors regarding reasons to come back during the identified target months.

### **19. What mode of transportation did you use to visit the Fredericksburg area? (circle one)**

<b>Automobile only</b>	<b>80.77%</b>
Motorcoach	10.90%
Other (specify)	4.49%
Combination fly / drive (if yes, what airport did you fly into?)	3.85%

## **Visitor Survey Findings and Responses**

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### **Demographics**

Demographics are the descriptive statistics dealing with a specific population of people. The demographics of visitors are excellent descriptions of the markets that are visiting an attraction or destination. The demographics of the sample of respondents who requested information about Fredericksburg Area are described in the following information.

#### **20. Education? (circle one)**

Grade school	0.43%
Some high school	0.87%
<b>High school graduate</b>	<b>22.08%</b>
Technical school	4.76%
<b>Some college</b>	<b>24.24%</b>
<b>College degree</b>	<b>25.54%</b>
Graduate school	21.21%
Other (specify)	0.87%

The largest percentage of respondents reported having a college degree (%), or having some college (%) followed by those attending graduate school (%). In general, the respondents were fairly well educated which is typical of the traveling public.

#### **21. What is your age and gender?**

Ages ranges from 16 to 98. Average = 51.08

Males comprised 36.73% of respondents; females 63.27%.

Just over three-fifths (%) of respondents were female while slightly more than one-third (%) were male. Typically RTM finds more female trip planning decision-makers than male. Given F.A.T.'s notoriety as "America's Secret City" it is encouraging to find such a high rate of return from females in what could have been an area considered as having primary appeal with men.

The average age of respondents is years. This also matches data for other similar areas

## Visitor Survey Findings and Responses

**22. What is your occupation? (circle one) The TOP TEN responses are in bold.**

<b>Retired</b>	<b>25.68%</b>
<b>Homemaker</b>	<b>12.61%</b>
<b>Management</b>	<b>8.11%</b>
<b>Professional</b>	<b>8.11%</b>
<b>Other (specify)</b>	<b>8.11%</b>
<b>Self employed</b>	<b>7.21%</b>
<b>Medical / health</b>	<b>5.41%</b>
<b>Government</b>	<b>5.41%</b>
<b>Educator</b>	<b>4.95%</b>
<b>Clerical</b>	<b>3.15%</b>
Student	2.70%
Sales	2.25%
Computer / technical	1.80%
Military	1.35%
Service	1.35%
Laborer	0.90%
Tradesman / machine operator	0.90%
Arts / music	0.00%
Craftsperson	0.00%

The data reported here tends to match what we find for other similar areas.

Professions listed as other included:

- Between Jobs
- City
- Business Owner - 2

Visitor Survey Findings and Responses

23. What is your home zip code?

VIRGINIA – 32 (17.1%)

Alcoa

Bartlett

Cookeville

Cordova - 3

Crossville

Germantown - 3

## **Visitor Survey Findings and Responses**

**24. Which category is closest to your total family income? (circle one)**

Less than \$20,000	8.78%
<b>\$20,000 - \$39,999</b>	<b>21.95%</b>
<b>\$40,000 - \$59,999</b>	<b>27.32%</b>
<b>\$60,000 - \$79,999</b>	<b>14.63%</b>
\$80,000 - \$99,999	12.20%
\$100,000 - \$119,999	6.34%
\$120,000 - \$139,999	1.95%
\$140,000 +	6.83%
No response	14.15%

The income reported by these respondents reflects their relatively high education level, and matches the findings from state research.

**25. In your opinion, what source of information most influences your travel decisions? Please rate the following on a five point scale where 1 reflects no influence and 5 reflects a major influence. (Please circle the appropriate number next to each category.) The TOP FIVE responses are in bold.**

<b>Advertising – Magazines</b>	<b>3.51</b>
<b>Brochures in Welcome Centers</b>	<b>3.47</b>
<b>Advertising – Newspapers</b>	<b>3.08</b>
<b>Friends and Relatives</b>	<b>3.07</b>
<b>Advertising – Newspaper advertising inserts</b>	<b>3.05</b>
Advertising – Television	3.00
Internet	2.80
Other	2.48
Advertising – Radio	2.33

The responses here match what we find in state and national data. Also see Travel Industry of America (TIA) data under question #7 in this document.



## **Visitor Survey Findings and Responses**

### **26. *What is your favorite magazine? (specify)***

**SOUTHERN LIVING - 21  
PEOPLE – 8  
TIME - 8**

**READERS DIGEST - 7  
NATIONAL GEOGRAPHIC – 6  
US NEWS & WORLD REPORT - 6**